

**City Clerk**



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## Department Description

The Office of the City Clerk has built on core services in order to expand its role of providing public access infrastructure. The Office offers San Diego residents a vital access-point to local government. Legislative documents, such as City Council agendas, are available both in the office and online with all supporting or exhibit material included for ease of access. The Summary Sheet, Results, and Minutes that capture the actions by the legislative body are also available online and organized by Council meeting. In addition, campaign finance disclosure, lobbyist reports, and statements of economic interests are retained and available for public inspection. The City Clerk is the filing officer for the City and administers municipal elections, coordinates public hearings, and disseminates information regarding legislative actions and policy decisions to City departments, other agencies, and the public. As the official record keeper, the City Clerk maintains custody of City records.

The Office's mission is:

*To provide accurate information and maximize access to municipal government*

## Goals and Objectives

The following goals and objectives represent the action plan for the Office:

### ***Goal 1: Provide support to the Mayor and City Council as they work to serve the residents of San Diego***

Every division within the Office of the City Clerk strives to support the Mayor and City Council as they work to serve the residents of San Diego. One important way of accomplishing this is by providing public access infrastructure to information relating to the legislative process. Over the next one to two years, the Office will continue to accomplish this goal by focusing on the following objectives:

- Prepare and distribute docket materials in a timely, efficient, and streamlined manner with an emphasis on electronic access initiatives that increase information availability while reducing cost where possible
- Continue to streamline the Council docket to provide more concise, yet thorough and informative, docket entries to the public to increase public participation

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- Effectively coordinate and administer public hearings, the resolutions and ordinances database, and Proposition 218 protest processes

## ***Goal 2: Administer municipal elections and serve as filing officer for the City of San Diego***

Proper administration of the election process serves the people's right to exercise their vote by ensuring an expeditious, complete process. The timely and accurate handling of disclosure documents provides another example of the ways in which the Office of the City Clerk acts as a critical, foundational source for information. Over the next one to two years, the Office will continue to accomplish this goal by focusing on the following objectives:

- Effectively administer and coordinate municipal elections
- Serve as filing officer by processing the City's campaign finance disclosure reports, statements of economic interests, and lobbyist registrations and reports
- Effectively support the election/appointment process for board and commission members

## ***Goal 3: Provide access to the City's official record and legislative documents in as many different media as possible in order to reach the broadest possible customer base***

The Office of the City Clerk provides the foundation for access to information in the City of San Diego. To this end, the Office is dedicated to seeking out and incorporating best practices with regard to information storage and retrieval. Over the next one to two years, the Office will move toward accomplishing this goal by focusing on the following objectives:

- Maintain and preserve City Council proceedings and related documents (e.g., minutes, result sheets, resolutions/ordinances, contracts/agreements, and leases/deeds/change orders)
- Expand electronic filing options within the City of San Diego where appropriate
- Apply technology effectively to provide increased and improved access to materials online
- Utilize the social media outlets of Twitter and Facebook to provide timely updates on Council actions; improve access to City-related information by placing forms and important filing deadlines online through the Office of the City Clerk website; and expand the number of followers tracking City actions

## ***Goal 4: Support the City's records management program***

A viable records management program ensures that each department can maximize its operational goals by making information more readily available for service delivery. Over the next one to two years, the Office will move toward accomplishing the goal by focusing on the following objectives:

- Work closely with department directors to update their records disposition schedules in order to assist them in retaining and organizing records for optimal operation and access by the public
- Preserve and make accessible the extremely fragile and priceless Pioneer Statehood records of San Diego (many from the 1850s) as part of a larger archives assessment and reorganization
- Provide records management training to educate all City staff on records management principles, best practices, government codes, and governing policies to facilitate legislative and regulatory compliance of City records

## ***Goal 5: Manage public access infrastructure and epitomize effective customer service***

The Office of the City Clerk is an independent office known for its impartiality, integrity, and exceptional customer service based on its ever-increasing ability to provide the public access to municipal government in an efficient, timely, professional, and courteous manner via the latest technology available. Over the next one or two years, the Office will move toward accomplishing this goal by focusing on the following objectives:

- Utilize best business practices for effective service delivery and apply flexibility to resource allocation across divisions
- Apply technology effectively to provide increased and improved access to materials online and increase staff's ability to respond quickly and accurately to customer requests
- Realize efficiencies by coordinating activities and standardizing processes across the City
- Ensure a high level of integrity and honesty in performance of work duties
- Improve public access to pertinent City information by expanding outreach efforts, including utilizing social media outlets, such as Twitter and Facebook

## ***Goal 6: Train for improved interdepartmental communication and efficiencies***

The Office of the City Clerk is involved in almost every aspect of City business by bridging the legislative and executive sides of government. Over the next one to two years, the Office will move toward accomplishing this goal by focusing on the following objectives:

- Provide appropriate training to both executive and legislative entities in the areas of records management, conflict of interest code update, statements of economic interests, and accessing online legislative resources provided by the Office
- Communicate effectively across the City utilizing Cable 24 to televise Council Docket information, records management training videos, and group presentations on a variety of topics to reach the largest audience in the most efficient manner

## **Key Performance Indicators**

Performance Measure	Actual FY2013	Estimated FY2014	Target FY2015
1. Level of public outreach achieved	92%	95%	95%
2. Percent of current legislative and election-related records made viewable online within a specified timeframe	99%	97%	95%
3. Percent of historical legislative and election-related records made viewable online within a fiscal year	100%	100%	100%
4. Number of hours of training provided to City staff within the fiscal year <sup>1</sup>	202	253	273

1. Training hours driven, in part, by external/occasional circumstances, such as special elections, conflict of interest code updates, etc.

## **Service Efforts and Accomplishments**

With an emphasis on customer service, Legislative Services continues to work toward a long-standing Office goal of emphasizing electronic access initiatives in order to increase information availability to its customers. Improvements have been made to the service delivery of a variety of legislative documents, including the City Council docket. Council members now use touch screen tablets to access docket materials online during Council meetings. By the end of Fiscal Year 2014, late-arriving (Senate Bill 343) docket material are slated to be added retroactively to the searchable docket exhibit material available online, and access to historical docket information will be at the most transparent and complete level of accessibility in the City's history. Having further reduced the number of docket binders from 13.0 to 11.5 in the past fiscal year, the Legislative Services Division continues to seek out best practice measures for further service delivery improvements. This progress is the result of years of access improvements that have built on early successes guided by customer feedback. In keeping with an emphasis on transparency, there has been a significant reduction in the time it takes to post the results of City Council actions online and to docket the minutes for Council approval. Additionally, the Office was recently awarded a grant by the Southern California City Clerks Association for the purchase of a new Assistive Listening System in the Council Chambers, which will assist hearing-impaired individuals to better access Council meetings. Further, it is anticipated that the public noticing kiosk in the breezeway just outside the City Administration Building will be updated by the end of the fiscal year to offer improved access to noticed documents.

Reflecting the breadth of City Clerk responsibilities, multiple resident petitions were accepted and processed through the Elections & Information Services Division. During Fiscal Year 2014, the special mayoral primary and special mayoral run-off elections were administered in addition to the regular June primary election. The former task

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included providing orientation to 35 candidates for public office, 11 of whom ultimately qualified for the primary ballot. Additionally, a Proposition 218 protest process was administered. Echoing the Office's goal of enhanced access, training was provided for dozens of City staff serving as department, agency, and board or commission liaisons for the annual filing of statements of economic interests. Training for the biennial conflict of interest code updates will begin in early Fiscal Year 2015. With an emphasis on public access, campaign disclosure statements and lobbyist registrations and reports were posted online. Over 2,000 requests for information came to the Office from a variety of sources and helped focus core services and resource allocations.

Providing accurate information and greater access to municipal government starts with a viable Records Management program, which helps to facilitate the efficient administration of City records. In an effort to promote the importance of records management, best practices, and awareness, the section of the Municipal Code that outlines the City's records management program was updated with references to current technology to help create a better tool for managing records and to serve as a clearer guide to internal and external customers for clarification. During Fiscal Year 2014, administrative regulations were also updated to better define the responsibility of the City Clerk and all City departments for the systematic application and disposition of all City records. With this principle in mind, the Records Division has embarked on the transition from the current Office-specific records disposition schedules to building a more streamlined Master Records Retention Schedule, which is still a work in progress. Records training is a vital part of ensuring that City staff, department Records Coordinators, and Council and Mayoral office staff are informed about new records technologies and best practices. With the goal of expanding training availability, the use of webinars is being explored as an effective method for reducing cost, leveraging limited staff, and reaching a wider audience citywide. Webinar technology helped create wider participation in the rollout of the Biennial Records Management Training for updating department records. Future plans include producing an online library of webinars to act as an additional resource to advance the objective of assisting City staff in the administration of City records.

In addition, the public's access to historical records has been enhanced with the addition of over 70,000 documents online for public viewing. Building on this enhancement, the City Clerk's Archives Access and Preservation Initiative began in 2013 with the approval and support of the City Council. This multi-year project will help to create an online digital archives library to make fragile, non-circulated historical documents available for the first time ever to the residents of San Diego. These documents contain the earliest writings in the formation of the history of San Diego.

Further, the Office began a partnership with the United States Department of State by becoming a Passport Acceptance Facility on July 1, 2013. Passport agents on the Clerk's staff process applications for passport books and cards and provide passport photo services as needed, by appointment and to walk-in customers, at a convenient downtown location. The Clerk also holds monthly Passport Fairs in conjunction with the naturalization ceremonies locally administered by the United States Department of Homeland Security. Currently, approximately 80 to 100 passport applicants utilize the Clerk's services each month.

Finally, the City Clerk continues to look for creative and cost-effective ways of improving service. The Office has a robust volunteer program, benefitting from over 5,500 hours of volunteer service each year, which is almost equivalent to three full-time staff members.

## Department Summary

	FY2013 Actual	FY2014 Budget	FY2015 Proposed	FY2014–2015 Change
FTE Positions (Budgeted)	45.12	45.28	<b>45.00</b>	(0.28)
Personnel Expenditures	\$ 3,709,589	\$ 4,137,582	\$ <b>4,082,165</b>	\$ (55,417)
Non-Personnel Expenditures	918,659	1,177,125	<b>1,255,665</b>	78,540
<b>Total Department Expenditures</b>	<b>\$ 4,628,248</b>	<b>\$ 5,314,707</b>	<b>\$ 5,337,830</b>	<b>\$ 23,123</b>
<b>Total Department Revenue</b>	<b>\$ 17,192</b>	<b>\$ 18,404</b>	<b>\$ 42,404</b>	<b>\$ 24,000</b>

## General Fund

### Department Expenditures

	FY2013 Actual	FY2014 Budget	FY2015 Proposed	FY2014–2015 Change
City Clerk	\$ 1,290,026	\$ 1,586,905	\$ <b>1,751,370</b>	\$ 164,465
Elections & Information Services	893,516	953,376	<b>898,205</b>	(55,171)
Legislative Services	1,539,315	1,763,846	<b>1,667,546</b>	(96,300)
Records Management	905,391	1,010,580	<b>1,020,709</b>	10,129
<b>Total</b>	<b>\$ 4,628,248</b>	<b>\$ 5,314,707</b>	<b>\$ 5,337,830</b>	<b>\$ 23,123</b>

### Department Personnel

	FY2013 Budget	FY2014 Budget	FY2015 Proposed	FY2014–2015 Change
City Clerk	3.12	4.28	<b>5.50</b>	1.22
Elections & Information Services	12.00	12.00	<b>10.50</b>	(1.50)
Legislative Services	20.00	19.00	<b>19.00</b>	0.00
Records Management	10.00	10.00	<b>10.00</b>	0.00
<b>Total</b>	<b>45.12</b>	<b>45.28</b>	<b>45.00</b>	<b>(0.28)</b>

### Significant Budget Adjustments

	FTE	Expenditures	Revenue
<b>Equipment/Support for Information Technology</b> Adjustment to expenditure allocations according to a zero-based annual review of information technology funding requirements and priority analyses.	0.00	\$ 32,648	\$ -
<b>Non-Discretionary Adjustment</b> Adjustment to expenditure allocations that are determined outside of the department's direct control. These allocations are generally based on prior year expenditure trends and examples of these include utilities, insurance, and rent.	0.00	29,042	-
<b>Records Management</b> Adjustment to reflect the addition of non-personnel expenditures for the operation and maintenance of the Records Management Division.	0.00	14,150	-
<b>Passport Acceptance Facility</b> Adjustment to reflect the addition of non-personnel expenditures and revenue for operational support of the Passport Acceptance Facility.	0.00	2,700	24,000

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## Significant Budget Adjustments (Cont'd)

	FTE	Expenditures	Revenue
<b>Non-Standard Hour Personnel Funding</b>	(0.28)	(10,063)	-
Adjustment to expenditures according to a zero-based annual review of non-standard hour personnel funding requirements.			
<b>Salary and Benefit Adjustments</b>	0.00	(45,354)	-
Adjustments to reflect the annualization of the Fiscal Year 2014 negotiated salary compensation schedule, changes to savings resulting from positions to be vacant for any period of the fiscal year, retirement contributions, retiree health contributions, and labor negotiation adjustments.			
<b>Total</b>	<b>(0.28)</b>	<b>\$ 23,123</b>	<b>\$ 24,000</b>

## Expenditures by Category

	FY2013 Actual	FY2014 Budget	FY2015 Proposed	FY2014-2015 Change
<b>PERSONNEL</b>				
Personnel Cost	\$ 2,143,818	\$ 2,337,456	\$ 2,269,935	\$ (67,521)
Fringe Benefits	1,565,771	1,800,126	1,812,230	12,104
<b>PERSONNEL SUBTOTAL</b>	<b>3,709,589</b>	<b>4,137,582</b>	<b>4,082,165</b>	<b>(55,417)</b>
<b>NON-PERSONNEL</b>				
Supplies	\$ 63,052	\$ 100,611	\$ 109,841	\$ 9,230
Contracts	105,209	151,531	154,320	2,789
Information Technology	537,472	680,881	713,529	32,648
Energy and Utilities	86,185	105,495	114,858	9,363
Other	4,532	161	4,761	4,600
Transfers Out	122,209	138,446	158,356	19,910
<b>NON-PERSONNEL SUBTOTAL</b>	<b>918,659</b>	<b>1,177,125</b>	<b>1,255,665</b>	<b>78,540</b>
<b>Total</b>	<b>\$ 4,628,248</b>	<b>\$ 5,314,707</b>	<b>\$ 5,337,830</b>	<b>\$ 23,123</b>

## Revenues by Category

	FY2013 Actual	FY2014 Budget	FY2015 Proposed	FY2014-2015 Change
Charges for Services	\$ 10,675	\$ 12,302	\$ 37,203	\$ 24,901
Fines Forfeitures and Penalties	-	2,802	1,000	(1,802)
Licenses and Permits	6,400	3,300	4,201	901
Other Revenue	117	-	-	-
<b>Total</b>	<b>\$ 17,192</b>	<b>\$ 18,404</b>	<b>\$ 42,404</b>	<b>\$ 24,000</b>

## Personnel Expenditures

Job Number	Job Title / Wages	FY2013 Budget	FY2014 Budget	FY2015 Proposed	Salary Range	Total
<b>FTE, Salaries, and Wages</b>						
20000012	Administrative Aide 1	1.00	1.00	0.00	\$36,962 - \$44,533	\$ -
20000024	Administrative Aide 2	3.00	3.00	4.00	42,578 - 51,334	191,472
20000119	Associate Management Analyst	6.00	6.00	6.00	54,059 - 65,333	370,550
20001106	City Clerk	1.00	1.00	1.00	34,694 - 207,210	138,000
20000539	Clerical Assistant 2	2.00	0.00	0.00	29,931 - 36,067	-
90000539	Clerical Assistant 2 - Hourly	0.06	0.00	0.00	29,931 - 36,067	-
20000370	Deputy City Clerk 1	17.00	18.00	18.00	32,968 - 39,811	671,325



## Personnel Expenditures (Cont'd)

Job Number	Job Title / Wages	FY2013 Budget	FY2014 Budget	FY2015 Proposed	Salary Range	Total
90000370	Deputy City Clerk 1 - Hourly	0.00	0.28	0.00	32,968 - 39,811	-
20000371	Deputy City Clerk 2	2.00	2.00	2.00	37,835 - 45,781	45,781
20001168	Deputy Director	3.00	3.00	3.00	46,966 - 172,744	319,227
20000293	Information Systems Analyst 3	0.00	1.00	1.00	59,363 - 71,760	71,760
20000347	Legislative Recorder 2	5.00	5.00	5.00	43,618 - 52,770	243,538
90000347	Legislative Recorder 2 - Hourly	0.06	0.00	0.00	43,618 - 52,770	-
20000172	Payroll Specialist 1	1.00	1.00	1.00	33,093 - 39,832	39,832
20000927	Senior Clerk/Typist	1.00	1.00	1.00	36,067 - 43,514	43,514
20000950	Stock Clerk	2.00	1.00	1.00	30,056 - 36,275	36,275
20000955	Storekeeper 1	0.00	1.00	1.00	34,611 - 41,517	34,611
20000756	Word Processing Operator	1.00	1.00	1.00	31,491 - 37,918	37,918
	Bilingual - Regular					16,016
	Overtime Budgeted					10,116
FTE, Salaries, and Wages Subtotal		45.12	45.28	45.00		\$ 2,269,935
		FY2013 Actual		FY2014 Budget	FY2015 Proposed	FY2014–2015 Change
Fringe Benefits						
	Employee Offset Savings	\$ 24,525	\$ 33,713	\$ 27,664	\$ (6,049)	
	Flexible Benefits	264,745	314,903	338,023	23,120	
	Insurance	265	-	-	-	
	Long-Term Disability	12,586	12,427	7,765	(4,662)	
	Medicare	28,661	30,680	31,289	609	
	Other Post-Employment Benefits	274,193	274,604	267,520	(7,084)	
	Retiree Medical Trust	89	99	174	75	
	Retirement 401 Plan	348	398	375	(23)	
	Retirement ADC	730,022	885,423	910,769	25,346	
	Retirement DROP	12,106	13,331	8,381	(4,950)	
	Retirement Offset Contribution	5,320	-	-	-	
	Risk Management Administration	43,976	41,668	45,232	3,564	
	Supplemental Pension Savings Plan	106,956	116,517	113,414	(3,103)	
	Unemployment Insurance	6,411	6,599	4,444	(2,155)	
	Workers' Compensation	55,570	69,764	57,180	(12,584)	
Fringe Benefits Subtotal		\$ 1,565,771	\$ 1,800,126	\$ 1,812,230	\$ 12,104	
Total Personnel Expenditures					\$ 4,082,165	



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